Washington State Department of Transportation

IRIS

USER'S

GUIDE

Integrated Realty Information System

Environmental and Engineering Programs
Real Estate Services

October 2007

Revision Sheet

Release No.	Date	Revision Description
Rev. 0	09/2007	Initial creation
Rev. 1	10/2007	First release

IRIS USER'S MANUAL

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1.0   GENERAL INFORMATION

1.0 GENERAL INFORMATION

1.1 System Overview

The Washington State Department of Transportation (WSDOT) Integrated Realty Information System (IRIS) is a web-based Right of Way (ROW) Management System. IRIS allows online management of the data required for ROW management, as defined in the WSDOT Right of Way Manual. IRIS is the next generation of the WSDOT Real Estate Information System (REIS), which is a desktop application that has assisted ROW management.

Because IRIS is a web-based system, it does not require any setup on the client workstations. Authorized users can access IRIS using Internet Explorer, Firefox, and Netscape. IRIS is designed to work with the recent versions of these browsers. However, certain version restrictions apply and must be confirmed with the system administrator in case any connectivity or workflow problems are detected.

IRIS is designed primarily for Intranet use. Authorized external users (non-WSDOT employees) who are granted access into the WSDOT network may also access the IRIS login page. However, IRIS maintains its own user database, and only users recorded into this database may enter IRIS. The IRIS system administrator controls all access to the system and may be contacted for any access-related issues.

Some of the highlights of IRIS include:

- User administration (restricted to administrative level users)
- Pick list administration (restricted to administrative level users)
- Project management
- Acquisition management
- Property management
- Disposal management
- Reporting

1.2 Organization of the Guide

The IRIS User's Guide is intended to help users navigate through this application. In addition to this general overview (Section 1.0), the Guide includes sections that cover Getting Started (2.0), Using the System (3.0), Reporting (4.0), and Administration (5.0).

Section 2.0 provides an introduction to the login page, the system menu (or the Simple Search page) and the main search portals (Acquisition Data and Property Management), the report menu, and the administration menu. It also addresses user name and password changes and how to exit the system. Section 3.0 explains the details of using the system. It takes the user step by step through searches in both the search portals. Section 4.0 discusses what is offered in the report menu, and Section 5.0 describes how to use the administration menu.

1.3   Acronyms and Abbreviations

WSDOT   Washington Department of Transportation

URL   Universal Record Locator

IRIS   Integrated Realty Information System

REIS   Realty Information System

LET   Lease Excise Tax

PIN   Program Identification Number

WIN   Work Order Identification Number

2.0   GETTING STARTED

2.0 GETTING STARTED

IRIS may be accessed at the URL provided by the WSDOT IRIS system administrator. Please contact your system administrator to obtain the correct URL. A username and password are essential to access the system, which must also be obtained from the system administrator.

2.1 Logging In

On the home page, enter your user name and password. Click the Login button.

If you enter an invalid user name or password combination, then the system will return you to the login prompt for another attempt. There are no limitations on the number of attempts that can be made before a successful login.

Invalid User Name Or Password

User Name :
Password :   [Login]

2.2   System Menu

After successfully logging in, the simple search screen will be the first screen you encounter. The **Simple Search** screen allows you to perform detailed searches of the IRIS database. You may search through one of two portals at any given time: **Acquisition Data** or **Property Management Data**. You may not perform a search simultaneously using criteria from both portals. Thus, only one portal is active at a time, as indicated by the active radio button next to the portal name.

If you are not administrative level user, then the ADMIN option may not appear in the menu bar, as illustrated here.

If you are not authorized to create a new project or inventory, then one or both of those options may be missing from the search page, as shown below.

2.2.1 Acquisition Data Portal

In this search portal, you have the option of searching with the following criteria: Project, Parcel Numbers, Project Version, Work Order Number, WIN, PIN, Project Title, RW Plan Title, Property Owner, and Tenant. All criteria are user selectable, and no user input is required.

To begin a search, select a value from one of the drop down menus in this portal. For example, select any Project. To find data that is related to the project you have chosen, click the Find Related Items link next to the Project field. Those criteria for which information is available will be populated with the relevant data. When more than one item is available per field, use the drop down menu to select from among the information given. You may further refine your search by using the Find Related Items link next to the desired criteria. When only one item is available in a drop down, the drop down option is disabled. Find Related Items may be disabled if the criterion is not associated to other criteria. The Last Filter Applied indicator in the top right corner of the page will indicate the last criterion that was chosen using the Find Related Items. The Reset All link in the top right corner will, when clicked, clear all fields. When you have picked all of the criteria you would like to use, click the Search button at the bottom of the page.

For a complete description of the acquisition search process, see section 3.1 of this document.

2.2.2 Property Management Portal

In this search portal, you have the option of searching with the following criteria: Inventory Number, Contract Number, Lease Number, Inventoried Parcel, RW Plan Title, Owner Name, Property Address, Tenant, and Turnbacks. All criteria are user selectable, and no user input is required.

To begin a search, select a value from one of the drop down menus in this portal. For example, select any Project. To find data that is related to the project you have chosen, click the Find Related Items link next to the Project field. Those criteria for which information is available will be populated with the relevant

data. When more than one item is available per field, use the drop down menu to select from among the information given. You may further refine your search by using the Find Related Items link next to the desired criteria. When only one item is available in a drop down, the drop down option is disabled. Find Related Items may be disabled if the criterion is not associated to other criteria. The Last Filter Applied indicator in the top right corner of the page will indicate the last criterion that was chosen using the Find Related Items. The Reset All link in the top right corner will, when clicked, clear all fields. When you have picked all of the criteria you would like to use, click the Search button at the bottom of the page.

For a complete description of the property management search process, see section 3.2 of this document.

2.2.3 Report Menu

The report menu is available to all users at all times after initial login to the system. Reports are not restricted by user privileges. Each report will open a new browser window or tab, based on the browser settings, and will run within the new window. The following reports may be executed at any time after you login to the system:
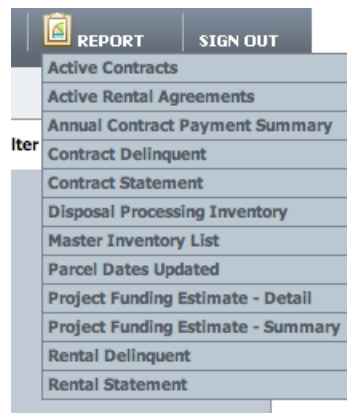
Brief descriptions of each report, including the inputs required by the report, are discussed in section 4.0 of this document.

2.2.4 Administration Menu

The administration menu is only available to those users that have administrative privilege to the system. When invoked, this menu will display the main administration home page. Details about the different administration options are discussed in section 5.0 of this document.

2.3 Changing Username and Password

For security purposes, IRIS does not permit users to modify their username or password. You must contact the IRIS system administrator if you would like to have one or both changed, or if you have misplaced your username and password combination.

2.4 Exiting the System

Click the Sign Out icon in the system menu at any time to sign out of the application.

3.0   USING THE SYSTEM

3.0   USING THE SYSTEM

3.1   Acquisition Data Search

In this portal, you have the option of searching with the following criteria: Project, Parcel Numbers, Project Version, Work Order Number, WIN, PIN, Project Title, RW Plan Title, Property Owner, and Tenant. All criteria are user selectable, and no user input is required. Some users may also be allowed to create a new project.

3.1.1 Creating a New Project

To create a new project, click the Create New Project link. You will be taken to the Project Entry subcategory of the Project Management category.

For details on how to proceed, refer to **3.1.3 Project Management**.

3.1.2 Searching

To begin a search, select a value from one of the drop down menus in this portal. For example, select any Project. To find data that is related to the project you have chosen, click the Find Related Items link next to the Project field. Those criteria for which information is available will be populated with the relevant data.

When more than one item is available per criteria, use the drop down menu to select from among the information given. To find data that is related to the project you have chosen, click the Find Related Items link next to the Project field. Those criteria for which information is available will be populated with the relevant data. When more than one item is available per field, use the drop down menu to select from among the information given. You may further refine your search by using the Find Related Items link next to the desired criteria. When only one item is available in a drop down, the drop down option is disabled. Find Related Items may be disabled if the criterion is not associated to other criteria. The Last Filter Applied indicator in the top right corner of the page will indicate the last criterion that was chosen using the Find Related Items. When you have picked all of the criteria you would like to use, click the Search button at the bottom of the page.

When you have chosen all the criteria you would like to use, click the Search button at the bottom of the page. Your search will move you into the Project Management category.

Note: If a specific parcel number is not selected in the Acquisition Data Search, then subsequent categories that require a parcel number will prompt you to select one and will return you to this search screen.

3.1.3 Project Management

There are five subcategories within the Project Management category. They are **General**, **Project Entry**, **Parcel Entry**, **Parcel Clear Dates**, and **Project Certification**. Each one will be discussed in order below.

Your Acquisition Data search will take you to the first subcategory, **General**, in the Project Management category. The information available in the General subcategory includes Project Information, Federal Highway Information, Project Location, Project Certification (both Region and HQ Certifications), Comments, and Previous Comments.

Note: The Project ID number is native to IRIS.

You may view Federal Highway Information and Project Certification for the project, if any is available.

You also may add information about the project's Location Description.

The Comments and Previous Comments sections allow you to include notes, as well as view and edit notes entered previously.

If you would like to edit a comment, click the link. The following dialog will appear.

The pick list will show all previous comments. Choose the one you would like to edit from the pick list. It will then appear in the window.

Note: Previous Comments are listed in reverse chronological order.

Note: The application does not save your work automatically. If you make any changes to any page, click Save (or sometimes Update) at the bottom of the page.

The second subcategory in Project Management is **Project Entry**. In this area, you may add or edit much of the information that you viewed in the General subcategory; you may also create a new project by clicking the New button. To save changes to information for a given project, click the Update or Save button.

You may view, edit, delete, or add information about R/W Plan Titles. Click the link to the right of the item you would like to change.

To add a R/W Plan title, click the Add button. The following dialog will open.

Once you have added your data and clicked Insert, the item will appear in the list of R/W Plan Titles in the Project Entry subcategory.

You may view details about Federal Highway Information, if any are available. Choose the FHWA Job Number you would like to see from the pick list.

Federal Highway Information

FHWA Job #:	
Federal Aid #:	
Preliminary Authorization:	
Project Agreement Execution:	
Effective Authorization:	

The Project Funding Estimate is included in this subcategory. Choose the Estimator's name from the pick list. In this screen, you may view the estimate, as well as change the Estimate Date, PFE Approval Date, and PFE Version Number.

Project Funding Estimate

Estimator's Name:*	Smith, John (Consultant) — Detail Information	Estimate Date:	
Phone Number:	(___)___-____	PFE Approval Date:	
Estimated Appraisal/AOS Cost:	$0.00	PFE Version #:*	1
Hazardous Materials:	$0.00	Demolition:	$0.00
Just Compensation:	$0.00	Total Relocation Compensation:	$0.00
Specialist:	$0.00	Total Cost Estimate:($)	0.00

Note: The Detail Information/Hide Information link that you see in this example next to the estimator's name is one you will see repeatedly in this application. IRIS often allows the user to both view and edit contact and other data for individuals and businesses. If you click the link, an expanded window will appear.

Project Funding Estimate

Estimator's Name:*	Smith, John (Consultant) — Hide Information	Estimate Date:	

	First Name *	Middle Name	Last Name *
Name:	John		Smith
Social Security Number:	___-__-____		
Staff or Consultant:	○ Staff ● Consultant		
Company Name:			
Address: Line 1: *	321 Any Street		
Line 2:			(Optional)
Line 3:			(Optional)
City: *	Olympia		
State:	Washington		
County:			
Zip: (#####-####)	____-____		
Phone Number: (###)###-####	(___)___-____		
Contact Number: (###)###-####	(___)___-____		
Fax Number: (###)###-####	(___)___-____		
E-Mail: (emailid@yourdomain.com)			
Website: (www.yourdomain.com)			

Save   Cancel –

Here you may add or change information the estimator's information. Click Save when you are finished. If you do not want to see this expanded window, click the Hide Information link.

Note: IRIS often indicates the format in which fields must be completed. In the example above, the zip code, phone number, and e-mail fields are a few that do so.

You may also view or change the Labor/Cost Estimate Per Parcel. If you make any changes, be sure to click the Update button in the top right corner of the page before navigating away.

Labor/Cost Estimate Per Parcel

Estimated Condemnation & Incidental Expense Factor:			0.00	%
Negotiation:	$0.00	Property Mgmt:	$0.00	
Relocation Assistance:	$0.00	Title/Processing:	$0.00	
Appraisal Review:	$0.00	Eval. Allowance:	$0.00	

The Comments and Previous Comments sections allow you to include notes, as well as view and edit notes entered previously.

Comments

Previous Comments Edit Comment

[admin admin] [10/14/2007 21:21:06] This is a new comment.

Save

If you would like to edit a comment, click the link. The following dialog will appear.

Edit Comments

Comments:

Save Cancel

The pick list will show all previous comments. Choose the one you would like to edit from the pick list. It will then appear in the window. Make your edits and click Save.

The third subcategory within Project Management is **Parcel Entry**. Here you may view, edit, and add information specific to parcels involved in the particular project for which you searched.

If you make any changes, you must click Save. To delete the entire parcel entry, click the Delete button at the bottom of the page.

Note: The Parcel Number is a DOT assigned number, distinct from the Tax Parcel Number. Whenever Parcel Number is mentioned in any project, it refers to the DOT number unless otherwise indicated. One DOT Parcel Number may contain one or more Tax Parcel Numbers.

To add a Tax Parcel Number, click Add, enter it in the field that appears, and click Insert, as shown below.

The Environmental section of this subcategory must be completed if there are any possible environmental impacts on the parcel in question.

You also may add Rights to be Acquired in the Parcel Entry subcategory. Click the button, then choose the rights from the pick list that appears, and click Insert.

To add or edit information in the Parcel Funding Estimate section, simply enter the desired values, except for the total estimate amount. When you click Save at the bottom of the page, the application will automatically calculate the figures and provide the total Parcel Funding Estimate.

You may also view, edit, delete, or add a Parcel Owner in this subcategory. To edit or delete, click the link to the right of an owner's name.

To add an owner, click the Add Owner button; the following dialog box will appear.

Choose whether the owner is a business or individual, then select one from the pick list and click Insert. If the owner for which you are looking is not included in the list, you may add one in this area. To do so, click Add Owner. The following dialog will come up.

Enter information about the parcel owner (fields with asterisks are required), then click Save. At that point, the owner will be included in the pick list in the main Add Owner option of the Parcel Owner section. Choose the owner you just added from that pick list and click Insert. That owner will then be displayed under Parcel Owner in the Parcel Entry subcategory.

You may view, edit, delete, or add an Occupant for the parcel, as well. To edit or delete, click the link to the right of the occupant's name.

To add an occupant, click the Add Occupant button. The following dialog will appear.

Fields with an asterisk are required. When you have entered your information, click Insert. The occupant will then appear in that section of the Parcel Entry subcategory.

The Relocation Benefits Estimate is also viewable and editable in this subcategory. Remember to click Save at the bottom of the page if you make any changes.

The Comments and Previous Comments sections allow you to include notes, as well as view and edit notes entered previously.

If you would like to edit a comment, click the link. The following dialog will appear.

The pick list will show all previous comments. Choose the one you would like to edit from the pick list. It will then appear in the window. Make your edits and click Save.

The fourth subcategory in the Project Management category is **Parcel Clear Dates**. Here you may view, edit, add, and delete information about Region Certification Clear Dates. After making any changes, click Save.

The Comments and Previous Comments sections allow you to include notes, as well as view edit notes.

If you would like to edit a comment, click the link. The following dialog will appear.

The pick list will show all previous comments. Choose the one you would like to edit from the pick list. It will then appear in the window. Make your edits and click Save.

The fifth subcategory in the Project Management category is **Project Certification**. Here you may view, edit, add and delete types of certifications for the project in question.

To edit or delete a certification, click the link to the right of the desired listing, as shown below.

To add a new certification, whether Region or HQ, click the New button. A dialog box will come up.
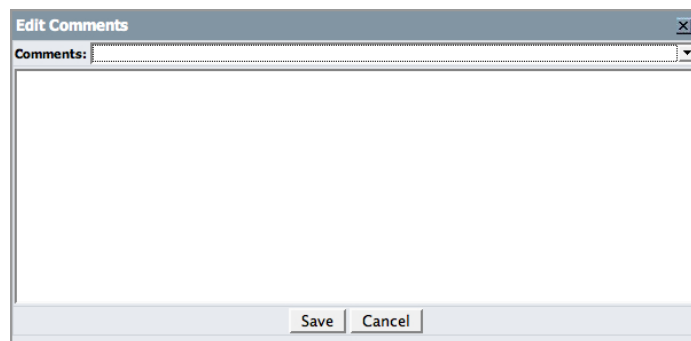
Choose the certification type from the pick list and the certification date from the calendar, then click Insert. The certification will then appear in the appropriate list in the Project Certification subcategory. Remember to click Save before navigating away from the page.

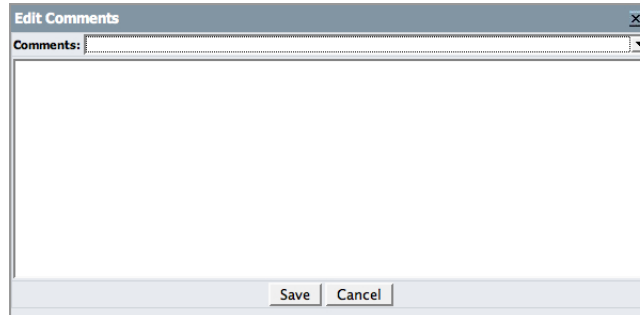The Comments and Previous Comments sections allow you to include notes, as well as view and edit notes.

If you would like to edit a comment, click the link. The following dialog will appear.

The pick list will show all previous comments. Choose the one you would like to edit from the pick list. It will then appear in the window. Make your edits and click Save.

3.1.4 Parcel Summary

The Parcel Summary category is a concise summation of all available information about parcels in the project for which you searched. It includes the following: Project Information, Details, Rights to be Acquired, Tax Parcel Numbers, Owners, Occupants, Clear Dates, and Comments. Select the parcel you wish to view from the pick list. To view parcels for other projects, click the Search icon to return to the Simple Search (System Menu) page.

Several specific details about the parcel are available here.

A listing of tax parcel numbers, owners, occupants, and clear dates are included in the parcel summary, as well.

The Comments and Previous Comments sections allow you to include notes, as well as view and edit notes entered previously.

If you would like to edit a comment, click the link. The following dialog will appear.

The pick list will show all previous comments. Choose the one you would like to edit from the pick list. It will then appear in the window. Make your edits and click Save.

3.1.5 Title

The Title category is where all title processing and tracking for projects is done. There are three subcategories: **General**, **Orders and Payments**, and **Recording and Policy**. Please note that the work flow in this category is as follows: A title order must first be placed by the user, or have already been placed, in the Orders and Payments subcategory before it can be tracked in the General subcategory.

You may view, edit, add, or delete information about Regional File Tracking once a title order has been placed, but only if it also has had a Title Examiner assigned to it in the Orders and Payments subcategory.

The Orders and Payments subcategory allows you to maintain information regarding title orders and payments.

To edit or delete an item in the Title Order History, click the link to the right of the item.

To add a Title Order History, you must first select a title company and then click Add Order History. Be aware that if the company you selected does not have an authorization number, the system will not allow you to use it without one being added. Contact a system administrator to have the authorization number entered. When you click Add Order History, the following dialog box will appear.

Enter your data, remembering that fields marked with an asterisk are required. Click Insert. Your order will then be listed in the Title Order History area of the Orders and Payments subcategory and you have effectively placed an order for a title. Save before navigating away from that page.

Note: In the example above, there is no list of Title Examiners from which to choose. However, if examiners are listed, select one from that list. A Title Examiner must be included in the Title Order History section for it to be tracked in the General subcategory of the Title category.

To edit or delete an item in the Title Payment History, click the link to the right of the item.

To add a Title Payment History click the Add Payment History button. When you do, a dialog box will appear.

Enter your data, remembering that fields marked with an asterisk are required. Click Insert. Your information will then be listed in the Title Payment History area of the Orders and Payments subcategory. Save before navigating away from that page.

The Comments and Previous Comments sections allow you to include notes, as well as view and edit notes.

If you would like to edit a comment, click the link. The following dialog will appear.

The pick list will show all previous comments. Choose the one you would like to edit from the pick list. It will then appear in the window. Make your edits and click Save.

In the **Recording and Policy** subcategory, you may view, edit, add, or delete information about the title(s) related to a project.

To edit or delete an item in the Recording Information list, click the link to the right of the item.

To add recording information, click the Add Recording Information button; the following dialog will appear.

Enter your data, remembering that fields marked with an asterisk are required. Click Insert. Your information will then be listed in the Recording Information section of the Recording and Policy subcategory. Remember to click Save before navigating away from the page.

In this subcategory, you may also view, edit, add, or delete details about the title policy itself, as shown below.

The Comments and Previous Comments sections allow you to include notes, as well as view and edit notes.

If you would like to edit a comment, click the link. The following dialog box will come up.

The pick list will show all previous comments. Choose the one you would like to edit from the pick list. It will then appear in the window. Make your edits and click Save.

3.1.6 Appraisals/AOS

The Appraisals/AOS category is where information regarding appraisals is entered and tracked. There are three subcategories: **Appraisals/AOS**, **Review Appraisal**, and **Specialist Evaluation**. Each one will be discussed in order below.

You may edit or delete existing appraisal information by clicking the link to the right of the details in the Appraisal Information list.

You may also add information by clicking the Add Appraisal Information button. When you do so, a dialog box will appear, such as the one below.

If the appraiser is not currently listed, you may add him or her by clicking the Add Appraiser link on the right. When you do so, a second dialog box will open within the first one, as shown here.

Also, if the business with which the appraiser is associated is not included in the pick list, you may add it by clicking the Add Business link. When you do so, a third dialog box will appear, as shown below.

Once you have added the business information, click Save. You will be returned to the Appraiser Information dialog, where the new business will now be included in the Company Name pick list. Once you have entered the appraiser information, click Save. The new appraiser will then appear in the pick list, and you may finish completing the appraisal information.
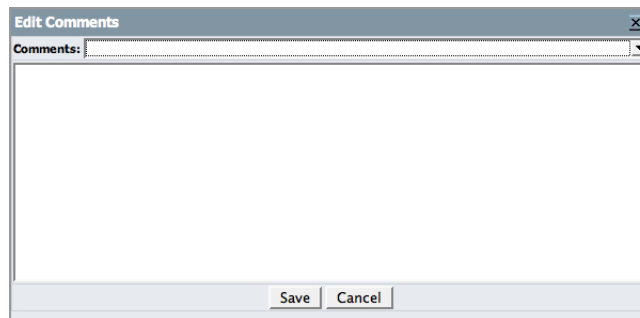
Notice that, as you add values in the column on the right, the application calculates the total for you. When you have entered all information, click Insert. The new information will then be shown in the Appraisal Information listing in the Appraisals/AOS subcategory. Remember to click Save if you have made any changes.

The Comments and Previous Comments sections allow you to include notes, as well as view and edit notes.

If you would like to edit a comment, click the link. The following dialog will appear.

The pick list will show all previous comments. Choose the one you would like to edit from the pick list. It will then appear in the window. Make your edits and click the Save button.

In the **Review Appraisal** subcategory, you may edit or delete information about any appraisal reviews that have been conducted by clicking the link to the right of the entry in the Review Appraisal Information section.

You may also add information by clicking the Add New Review button. When you do so, a dialog box will appear, such as the one below.

If the reviewer is not currently listed, you may add him or her by clicking the Add Reviewer link on the right. When you do so, a second dialog box will open within the first one.
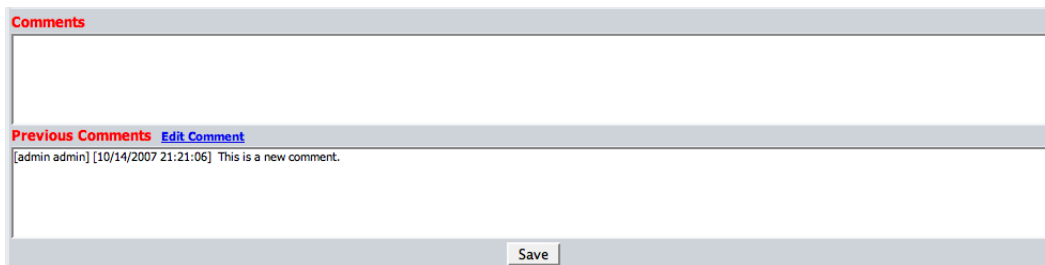
Also, if the business with which the reviewer is associated is not included in the pick list, you may add it by clicking the Add Business link. When you do so, a third dialog box will expand.

Once you have added the business information, click Save. You will be returned to the Review Appraiser Information dialog, where the new business will now be included in the Company Name pick list. Once you have entered the reviewer information, click Save. The new reviewer will then appear in the pick list, and you may finish completing the review information, including Just Compensation. Remember that fields marked with an asterisk are required.
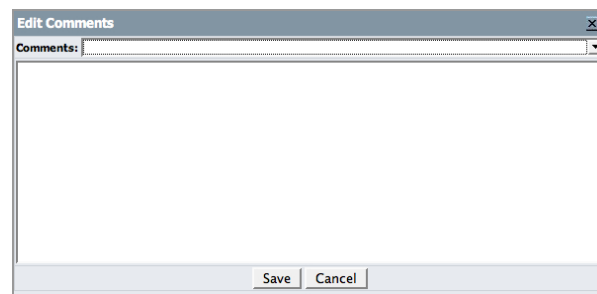
Notice that, as you add values in the column on the right in the Review Information section, the application calculates the total for you. When you have entered all information, click Insert. The new information will then be shown in the Review Appraisal Information section in the Review Appraisal subcategory. Remember to click Save if you have made any changes before moving on.

The Comments and Previous Comments sections allow you to include notes, as well as view and edit notes entered previously.

If you would like to edit a comment, click the link. The following dialog will appear.

The pick list will show all previous comments. Choose the one you would like to edit. Make your edits and Save.

In the **Specialist Evaluation** subcategory, you will find details about any appraisals made by specialists.

To edit or delete information about an evaluation, click the links to the right of the entry in the list.

You may also add information by clicking the Add Specialist Evaluation button. When you do so, a dialog box will appear, such as the one below.

If the specialist is not currently listed, you may add him or her by clicking the Add Specialist link on the right. When you do so, a second dialog box will open within the first one.
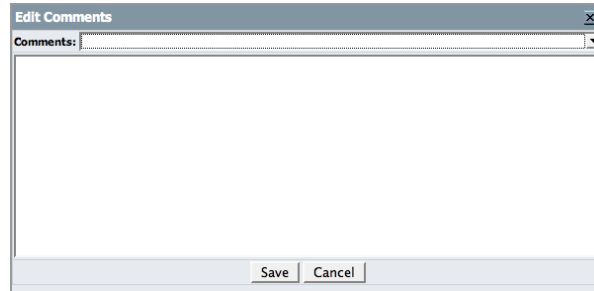
Fields marked with an asterisk are required. When you have entered all data, click Insert. The new information will then be shown in the Specialist Information section in the Specialist Evaluation subcategory. Remember to click Save if you have made any changes before moving on.

The Comments and Previous Comments sections allow you to include notes, as well as view and edit notes.

If you would like to edit a comment, click the link. The following dialog will appear.

The pick list will show all previous comments. Choose the one you would like to edit. Make your edits and Save.

3.1.7 Acquisition

The Acquisition category consists of six subcategories: **Pre-Acquisition**, **Offer**, **Negotiated P & U**, **Final Settlement**, **Post-Acquisition**, and **Payment Summary**. Each one will be discussed in order below.

In the **Pre-Acquisition** subcategory, you have the ability to view, edit, delete, or add information about pre-acquisition activity and payments.

You may edit or delete information about any acquisition activity by clicking the link to the right of the entries in the list.

To add information about acquisition activity, click the Add Acquisition Activity button. When you do, the following dialog will appear.

Fields marked with an asterisk are required. When you have entered all information, click Insert. The new information will then be shown in the Acquisition Activity section in the Pre-Acquisition subcategory. Remember to click Save if you have made any changes before moving on.

You may edit or delete information about any payment information by clicking the link to the right of the entries in the list.

To add payment information, click the Add Payment Type button. When you do, the following dialog will appear.
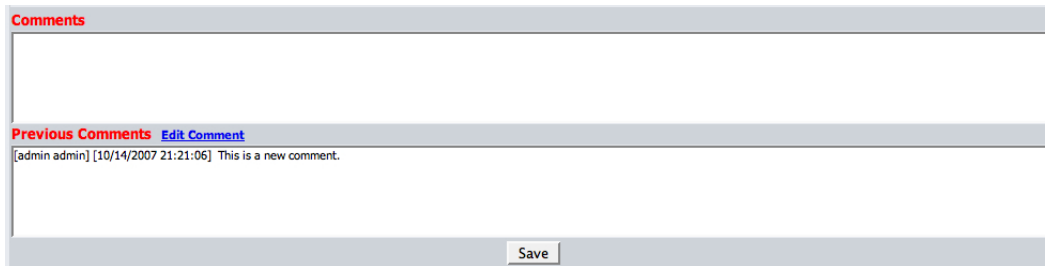

Fields marked with an asterisk are required. When you have entered all information, click Insert. The new information will then be shown in the Payment Information section in the Pre-Acquisition subcategory. Remember to click Save before moving on.

The Comments and Previous Comments sections allow you to include notes, as well as view and edit notes entered previously.

If you would like to edit a comment, click the link. The following dialog will appear.

The pick list will show all previous comments. Choose the one you would like to edit. Make your edits and Save.

The **Offer** subcategory allows you to view, edit, delete, or add information about offers, revised offers, counter offers, and negotiator's reports.

You may edit or delete information about any revised offers or counter offers by clicking the link to the right of the entries in the lists.

To add information about a revised offer, click the Add Revised Offer button. When you do, the following dialog will appear.
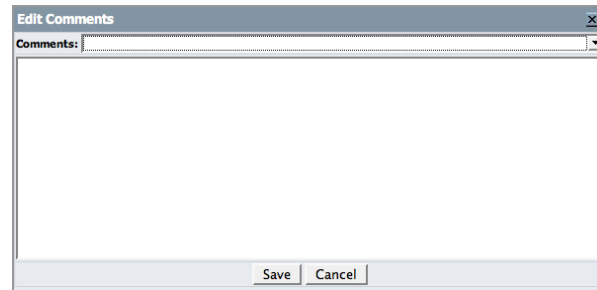
Fields marked with an asterisk are required. When you have entered all information, click Insert. The new information will then be shown in the Revised Offer section in the Offer subcategory. Remember to click Save before moving on.
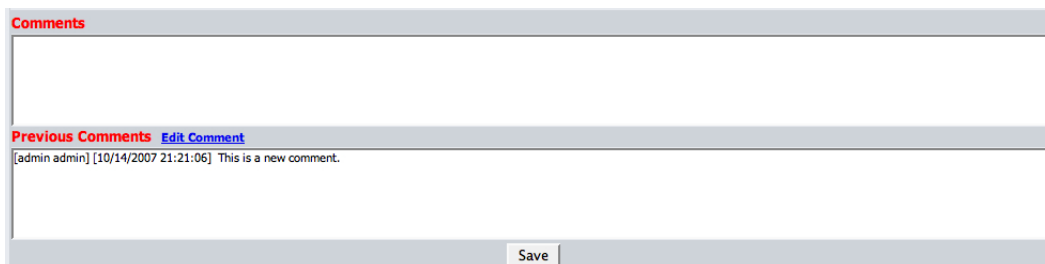
To add information about an owner's counter offer, click the Add Owner's Counter Offer button. When you do, the following dialog will appear.
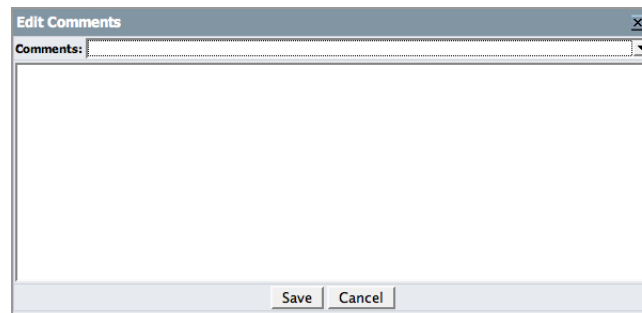
Fields marked with an asterisk are required. When you have entered all information, click Insert. The new information will then be shown in the Owner's Counter Offer section in the Offer subcategory. Remember to click Save before moving on.

The Comments and Previous Comments sections allow you to include notes, as well as view and edit notes entered previously.

If you would like to edit a comment, click the link. The following dialog will appear.

The pick list will show all previous comments. Choose the one you would like to edit from the pick list. It will then appear in the window. Make your edits and click Save.

The **Negotiated P & U** subcategory allows you to view, edit, delete, or add about transmittal information, payment information, and payment summary data about negotiated possession and use for the project in question.

In the Transmittal Information section, you may enter and view relevant data, as shown below.

The Payment Information section allows you to enter and view details regarding payment.

Notice that, as you add values in this section, the application calculates the total for you.

The Payment Summary section allows you to view and enter additional information about payments.

The Comments and Previous Comments sections allow you to include notes, as well as view and edit notes entered previously.

If you would like to edit a comment, click the link. The following dialog will appear.

The pick list will show all previous comments. Choose the one you would like to edit from the pick list. It will then appear in the window. Make your edits and click Save.

In the **Final Settlement** subcategory, you may view, edit, delete, or add transmittal information, payment information, and payment summary data pertinent to the final settlement for the acquisition in question.

In the Transmittal Information section you may enter and view data, as shown below.

The Payment Information section allows you to enter and view details regarding payment.

Notice that, as you add values in Payment Information section, the application calculates the total for you. When you have entered all desired information on the page, click Save. Remember, fields marked with an asterisk are required.

The Payment Summary section allows you to view and enter additional information about payments.

The Comments and Previous Comments sections allow you to include notes, as well as view and edit notes entered previously.
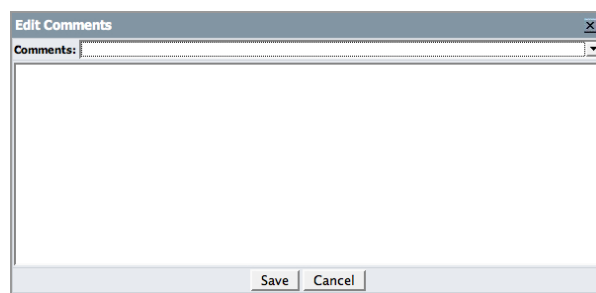
If you would like to edit a comment, click the link. The following dialog will appear.

The pick list will show all previous comments. Choose the one you would like to edit from the pick list. It will then appear in the window. Make your edits and click Save.

In the **Post Acquisition** subcategory, you may view, edit, delete, or add transmittal information, payment information, and payment summary data relevant to the final settlement for the acquisition in question.

You may edit or delete information about any acquisition activity by clicking the link to the right of the entries in the list.

To add information about Acquisition Activity, click the Add Acquisition Activity button. When you do, the following dialog will appear.

Fields marked with an asterisk are required. When you have entered all information, click Insert. The new information will then be shown in the Acquisition Activity section in the Post Acquisition subcategory. Remember to click Save before moving on.

You may edit or delete details about any payment information by clicking the link to the right of the entries.

To add information about Payment Information, click the Add Payment Type button. When you do, the following dialog will appear.

Fields marked with an asterisk are required. When you have entered all information, click Insert. The new information will then be shown in the Payment Information section in the Post Acquisition subcategory. Save your changes before navigating away from the page.

The Comments and Previous Comments sections allow you to include notes, as well as view and edit notes entered previously.

If you would like to edit a comment, click the link. The following dialog will appear.

The pick list will show all previous comments. Choose the one you would like to edit from the pick list. It will then appear in the window. Make your edits and click Save.

In the **Payment Summary** subcategory, you may view and make or edit comments about the acquisition history for the parcel in question.

The Comments and Previous Comments sections allow you to include notes, as well as view and edit notes entered previously.

If you would like to edit a comment, click the link. The following dialog will appear.

The pick list will show all previous comments. Choose the one you would like to edit from the pick list. It will then appear in the window. Make your edits and click Save.

3.1.8 Condemnation

The Condemnation category consists of three subcategories: **General**, **Possession and Use**, and **Judgment and Decree**. Each one will be discussed in order below.

In the **General** subcategory, you have the ability to view, edit, delete, or add information about the Attorney General's office, cases, and respondents.

You may view or add information about any cases pertaining to the parcel in this section.

You may edit or delete information about the respondents and/or their attorneys by clicking the link to the right of the entries in the list.

To add information about a respondent, click the Add Respondent button. When you do, the following dialog will appear.

If an individual, business, or attorney is not currently listed, you may add him or her by clicking the Add Individual, Add Business, or Add Attorney link on the right. When you do so, a second dialog box will open within the first one, as shown below.

Save the information about the new individual, business, or attorney, and then click Insert. The new information will then be shown in the Respondent section in the General subcategory of the Condemnation subcategory. Remember to click Save before moving on.

The Comments and Previous Comments sections allow you to include notes, as well as view and edit notes entered previously.

If you would like to edit a comment, click the link. The following dialog will appear.

The pick list will show all previous comments. Choose the one you would like to edit from the pick list. It will then appear in the window. Make your edits and click Save.

In the **Possession and Use** subcategory, you have the ability to view, edit, delete, or add information about amendments and payments for possession and use.

To edit or delete data about Amendments or Payments, click the edit or delete links next to the entries in those sections.

To add information about Amendments, click the Add Amendment button. When you do, the following dialog will appear.
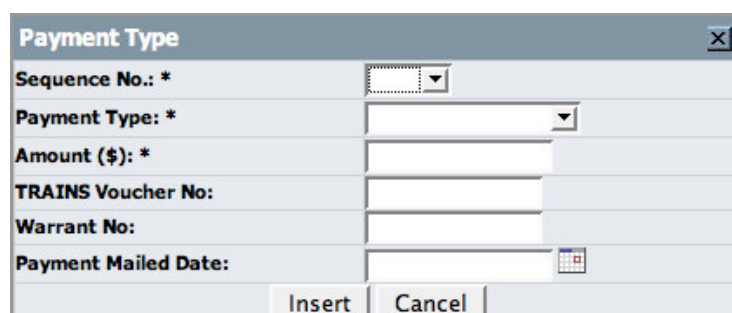
Fields marked with an asterisk are required. When you have entered all information, click Insert. The new information will then be shown in the Amendment section in the Possession and Use subcategory. Remember to click Save before leaving the page.
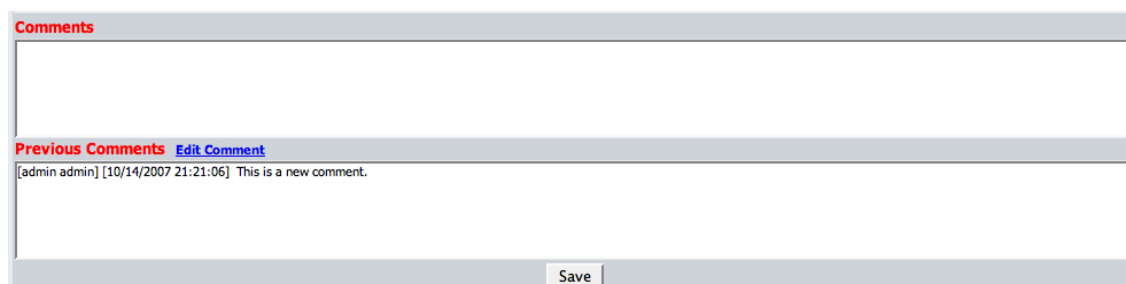
To add information about Payment Information, click the Add Payment button. When you do, the following dialog will appear.

Fields marked with an asterisk are required. When you have entered all information, click Insert. The new information will then be shown in the Payments section in the Possession and Use subcategory. Save your changes before navigating away from the page.

The Comments and Previous Comments sections allow you to include notes, as well as view and edit notes entered previously.

If you would like to edit a comment, click the link. The following dialog will appear.

The pick list will show all previous comments. Choose the one you would like to edit from the pick list. It will then appear in the window. Make your edits and click Save.

In the **Judgment and Decree** subcategory, you have the ability to view, edit, delete, or add information about judgments.

You may edit or delete information about payments by clicking the link to the right of the entries in the list.

Payments

Payment Category	Payment Amount	Payment Voucher Number	HQ Payment Approval Date	Warrant Number	Warrant Sent to Court		
Attorney Fees	$5,000.00	14841321	09/08/2007	2167941	09/12/2007	Edit	Delete

Add Payment +

To add information about a payment, click the Add Payment button. When you do, the following dialog will appear.
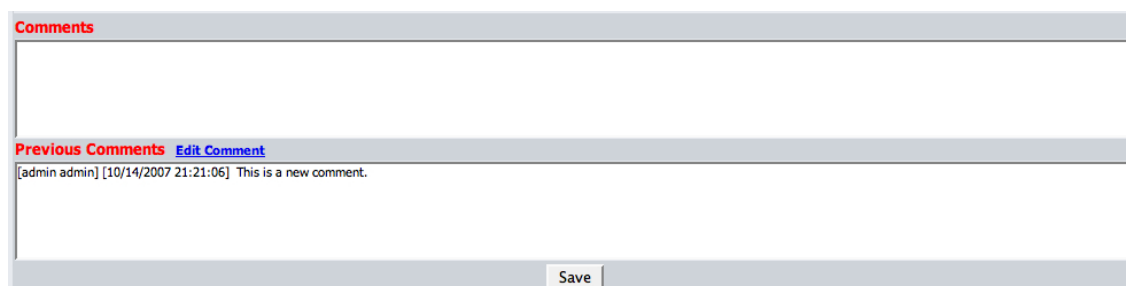
Payments

Payment Category: *
Payment Amount ($): *
Payment Voucher Number: *
HQ Payment Approval Date: *
Warrant Number: *
Warrant Sent to Court: *

Insert   Cancel

When you have entered all information, click Insert. The new information will then be shown in the Payments listing in the Judgment and Decree subcategory. Remember to click Save before moving on.
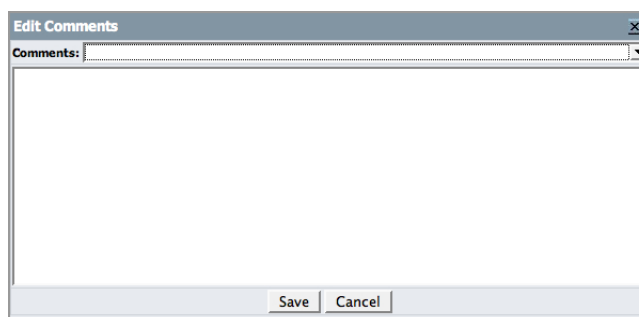
The Comments and Previous Comments sections allow you to include notes, as well as view and edit notes entered previously.

Comments

Previous Comments **Edit Comment**
[admin admin] [10/14/2007 21:21:06] This is a new comment.

Save

If you would like to edit a comment, click the link. The following dialog will appear.

Edit Comments
Comments:

Save   Cancel

The pick list will show all previous comments. Choose the one you would like to edit from the pick list. It will then appear in the window. Make your edits and click Save.

3.1.9 Relocation

The Relocation category consists of five subcategories: **General**, **Parcel Set-up**, **Residential**, **Non-Residential**, and **Personal Property**. Each one will be discussed in order below.

In the **General** subcategory, you have the ability to view, edit, delete, or add information about relocation plans and amendments.

You may edit or delete information about relocation plans/amendments by clicking the link to the right of the entries in the list.

To add a relocation plan/amendment, click the Add Relocation Plan/Amendments button. When you do, the following dialog will appear.
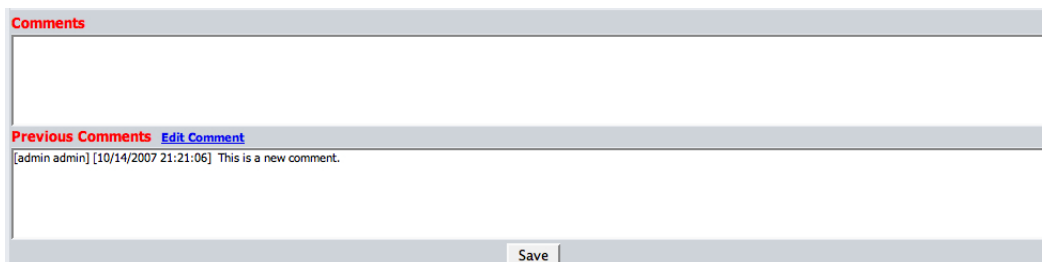
When you have entered all information, click Insert. The new information will then be shown in the Relocation Plans/Amendments section in the General subcategory. Remember to click Save before moving on.

The Comments and Previous Comments sections allow you to include notes, as well as view and edit notes entered previously.
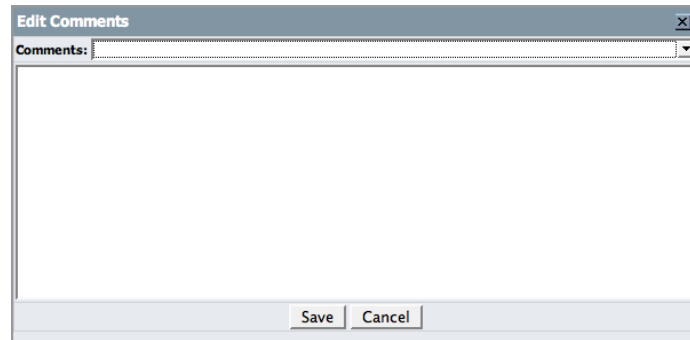

If you would like to edit a comment, click the link. The following dialog will appear.

The pick list will show all previous comments. Choose the one you would like to edit from the pick list. It will then appear in the window. Make your edits and click Save.

In the **Parcel Set-up** subcategory, you have the ability to view, edit, delete, or add information about displacees.

You may edit or delete information about displacees by clicking the link to the right of the entries in the list.

To add a displacee, click the Add Displacee button. When you do, the following dialog will appear.

Be aware that the information to be entered varies depending on whether the relocation type is residential, personal property, or Non-Residential. Choose the relocation type from the pick list.

If the individual (in a residential relocation) or the business (in a Non-Residential relocation) is not currently listed, you may add it by clicking the Add New link to the right. When you do so, a second dialog box will open within the first one, as shown below.

Once you have entered the displacee, click Save. The new displacee will then appear in the pick list, and you may finish completing the displacee information. Remember that fields marked with an asterisk are required. Then click Insert. The displacee will then show up in the Displacee section in the Parcel Set-up subcategory.

The Comments and Previous Comments sections allow you to include notes, as well as view and edit notes entered previously.

If you would like to edit a comment, click the link. The following dialog will appear.

The pick list will show all previous comments. Choose the one you would like to edit from the pick list. It will then appear in the window. Make your edits and click Save.

In the **Residential** subcategory, you have the ability to view, edit, delete, or add information about details of residential relocations.

In the Title VI section, you are able to view, add, edit, or delete related information.

You may edit or delete information about occupants by clicking the link to the right of the entries in the list.

To add an occupant, click the Add Occupant button. When you do, the following dialog will appear.

When you have entered all information, click Insert. The new occupant will then be shown in the Occupants section in the Residential subcategory. Remember to click Save before leaving the page.
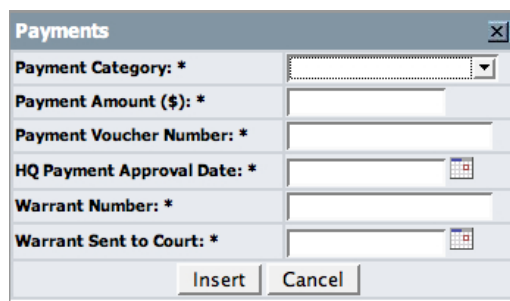
Details about replacement property are given in the Replacement Property section. You may add, edit, or delete them as necessary.

In the Move Information section, you are able to view, add, edit, or delete details about moving the displacee.

Move Information				
Type	Move Selected	Approved Amount		
Commercial :	☐	$	Mover Name :	
Self-Fixed :	☐	$	Effective Room Count :	
Self-Actual :	☐	$		

In the Storage section, you may view, add, edit, or delete information about storing the displacee's belongings.

Storage			
Approved Date :		Number of Months :	
Amount :	$		

If an appeal has been made, the Appeal Information section is where you may include, edit, or delete its details.

Appeal Information			
Letter Dated :		Letter Received :	
Response Date :		Complete Date :	
Disposition :			

The Review and Approval Request/Claims section shows any requests or claims that have been made. To edit or delete them, click the link to the right of the entry in the list.
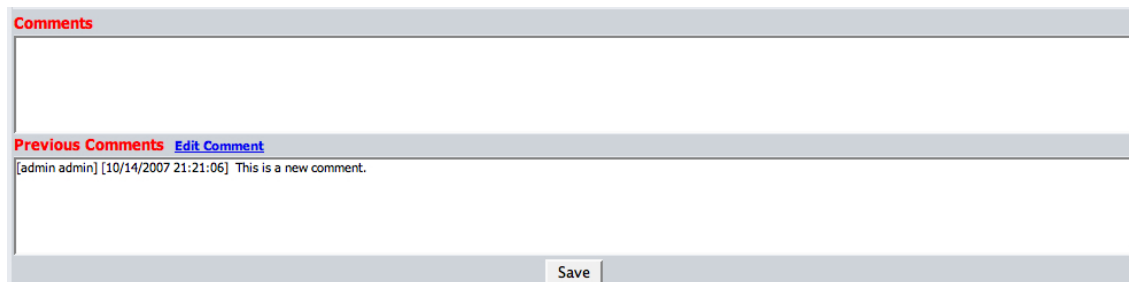
Review and Approval Request/Claims										
Document Type	Date Received	Amount	Date Additional Info. Requested	Date Info. Received	Date Approved	Date Paid	Description/Comments	Object Code		
Memo/Letter									Edit	Delete
Add Review and Approval Request/Claims +										
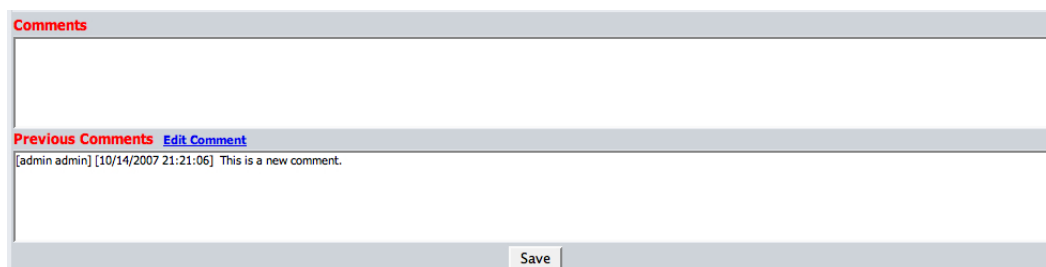
To add a review and approval request/claim, click the Add Review and Approval Request/Claims button. When you do, the following dialog will appear.

Review and Approval Request/Claims	
Document Type : *	
Date Received :	
Amount :	$
Date Additional Info. Requested :	
Date Info. Received :	
Date Approved :	
Date Paid :	
Description /Comments :	
Object Code :	

Insert   Cancel

When you have entered all information, click Insert. The new request/claim will then be shown in the Review and Approval Request/Claims section in the Residential subcategory.
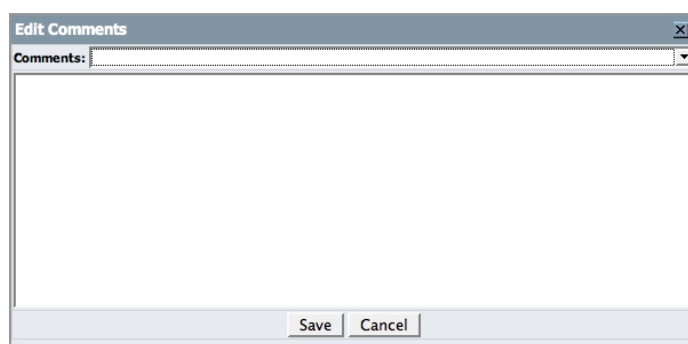
The Comments and Previous Comments sections allow you to include notes, as well as view and edit notes entered previously.

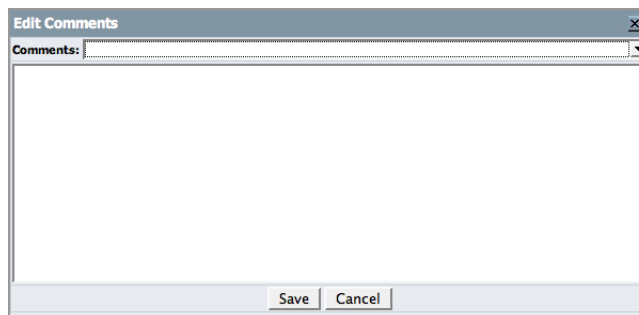If you would like to edit a comment, click the link. The following dialog will appear.

The pick list will show all previous comments. Choose the one you would like to edit from the pick list. It will then appear in the window. Make your edits and click Save.

In the **Non-Residential** subcategory, you have the ability to view, edit, delete, or add information about details of Non-Residential relocations.

In the Title VI section, you are able to view, add, edit, or delete related information.

In the Move Information section, you are able to view, add, edit, or delete details about moving the displacee.

In the Storage section, you may view, add, edit, or delete information about storing the displacee's belongings.

Details about replacement property are given in the Replacement Property section. You may add, edit, or delete them as necessary.

To record or edit data about costs paid to date, check the Costs Paid to Date section.

If an appeal has been made, the Appeal Information section is where you may include, edit, or delete its details.

The Review and Approval Request/Claims section shows any requests or claims that have been made. To edit or delete them, click the link to the right of the entry in the list.

To add a review and approval request/claim, click the Add Review and Approval Request/Claims button. When you do, the following dialog will appear.

When you have entered all information, click Insert. The new request/claim will then be shown in the Review and Approval Request/Claims section in the Residential subcategory.
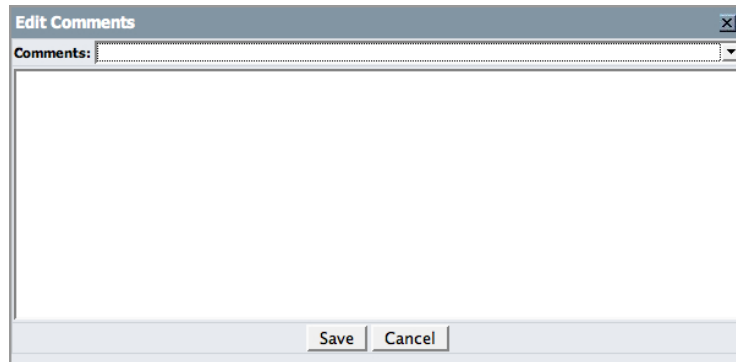
The Comments and Previous Comments sections allow you to include notes, as well as view and edit notes entered previously.

If you would like to edit a comment, click the link. The following dialog will appear.

The pick list will show all previous comments. Choose the one you would like to edit from the pick list. It will then appear in the window. Make your edits and click Save.

In the **Personal Property** subcategory, you have the ability to view, edit, delete, or add information about details of personal property relocations.

In the Title VI section, you are able to view, add, edit, or delete related information.

In the Move Information section, you are able to view, add, edit, or delete details about moving the displacee.

In the Storage section, you may view, add, edit, or delete information about storing the displacee's belongings.

Details about replacement property are given in the Replacement Property section. You may add, edit, or delete them as necessary.

If an appeal has been made, the Appeal Information section is where you may include, edit, or delete its details.

The Review and Approval Request/Claims section shows any requests or claims that have been made. To edit or delete them, click the link to the right of the entry in the list.

To add a review and approval request/claim, click the Add Review and Approval Request/Claims button. When you do, the following dialog will appear.

When you have entered all information, click Insert. The new request/claim will then be shown in the Review and Approval Request/Claims listing in the Residential subcategory.

The Comments and Previous Comments sections allow you to include notes, as well as view and edit notes entered previously.

If you would like to edit a comment, click the link. The following dialog will appear.

The pick list will show all previous comments. Choose the one you would like to edit from the pick list. It will then appear in the window. Make your edits and click Save.

3.1.10 Diary

The Diary feature offers each individual user a private place to make comments, notes, and journal entries. Each user is allowed to view only their own diary, not those of other users. The system administrator, however, may view all users' diaries.

The Diary is accessible through both the Acquisition Data and Property Management search portals. Its functionality is the same, regardless of how you enter the diary. Simply insert your comments in the Content field and click the Save button.

3.2 Property Management Data Search

Property Management is a large category and therefore has been divided into three main subcategories: **Property Detail**, **Disposal**, and **Leases**. Those three have been further split into minor subcategories. **Property Detail** is comprised of *Property Inventory* and *Maintenance/Demolition*. **Disposal** includes *Disposal General*, *Disposal Sale*, *Disposal Contract Schedule and Payments*, and *Turnbacks*. **Leases** is made up of *Leases* and *Lease Payments*. Each one will be discussed in order below.

In this portal, you have the option of searching with the following criteria: Inventory Number, Contract Number, Lease Number, Inventoried Parcel, RW Plan Title, Owner Name, Property Address, Tenant, and Turnbacks. All criteria are user selectable, and no user input is required. Administrator level users will also be allowed to create new inventory.

3.2.1 Creating a New Inventory

To create a new inventory, click the Create New Inventory link. You will be taken to the *Property Inventory* subcategory, and the screen below will appear.

For details on how to proceed, refer to **3.2.3 Property Detail: Property Inventory**.

3.2.2 Searching

To begin a search, select a value from one of the drop down menus in this portal. For example, select any Inventory Number.

When more than one item is available per criteria, use the drop down menu to select from among the information given. Those criteria for which information is available will be populated with the relevant data. When more than one item is available per field, use the drop down menu to select from among the information given. You may further refine your search by using the Find Related Items link next to the desired criteria. When only one item is available in a drop down, the drop down option is disabled. Find Related Items may be disabled if the criterion is not associated to other criteria. The Last Filter Applied

indicator in the top right corner of the page will indicate the last criterion that was chosen using the Find Related Items.

When you have picked all of the criteria you would like to use, click the Search button at the bottom of the page.

3.2.3 Property Detail: Property Inventory

Your Property Management Data search will take you to the *Property Inventory* subcategory within the **Property Detail** subcategory. Here you will be able to enter information about the property inventory, improvements/fixtures/land inventory and disposition, acquisition data, and location data. Fields marked with an asterisk are required. To save your changes, click Save at the bottom of the page.

You may view, edit, delete, or add information about improvements/fixtures/land inventory and dispositions. To edit or delete an item, click the link to the right.

To add, click the Add button. A dialog such as the one below will appear.

If the purchaser is not listed, you may add him or her by clicking the Add Purchaser link. A dialog box will appear within the current Add Improvements screen.

Enter your information and click Save. Then fill out the rest of the fields in the Add Improvements section and click Insert.

In the Acquisition Data section, you may view, edit, delete, or add information about parcel acquisition. To edit or delete an item, click the link to its right.

To add, click the Add Acquisition Data button. A dialog such as the one below will appear.
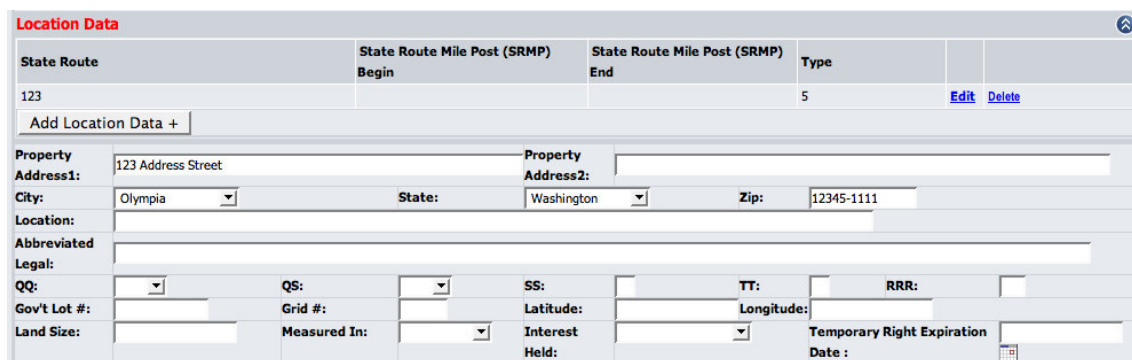
Fields with an asterisk are required. Enter your information and click Insert. The new information will be listed in the Acquisition Data section of the Property Inventory subcategory. Click Save before leaving the page.

In the Location Data section, you may view, edit, delete, or add information about the parcel location. To edit or delete an item, click the link to its right.
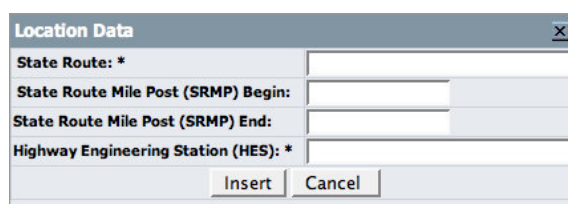
To add, click the Add Location Data button. A dialog such as the one below will appear.
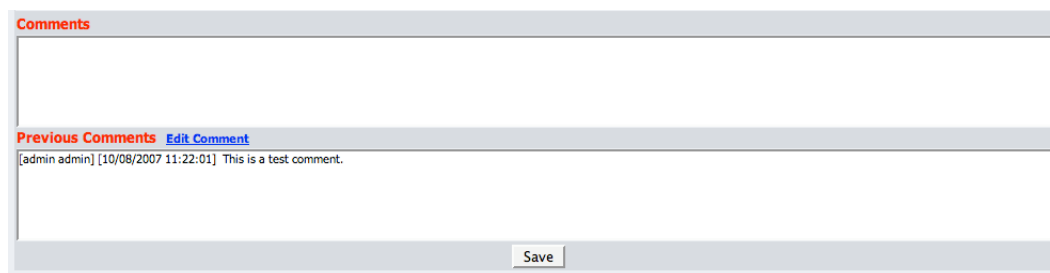
Fields with an asterisk are required. Enter your information and click Insert. The new information will be listed in the Location Data section of the Property Inventory subcategory.

The Comments and Previous Comments sections allow you to include notes, as well as view and edit notes entered previously.

If you would like to edit a comment, click the link. The following dialog will appear.

The pick list will show all previous comments. Choose the one you would like to edit. Make your edits and Save.

3.2.4 Property Detail: Maintenance/Demolition

The *Maintenance/Demolition* subcategory allows you to view, edit, delete, and add data about the following: Charge Codes, Inspections, Maintenance Lists, Assessment Payments History, Demolition, and Demolition Cost Breakdown.

You may view, edit, delete, or add information about charge codes. To edit or delete, click the link to the right of the item. To add, click the Add Charge Codes button. A dialog such as the one below will appear.
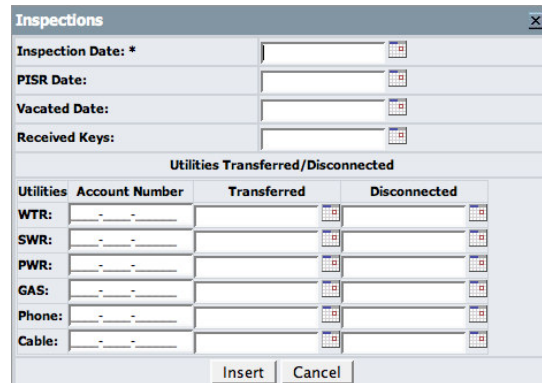
Fields with an asterisk are required. Enter your information and click Insert. The new information will be listed in the Charge Codes section of the Maintenance/Demolition subcategory. Remember to click Save before leaving the page.

You may view, edit, delete, or add information about inspections. To edit or delete, click the link to the right of the item.

To add, click the Add Inspections button. A dialog such as the one below will appear.
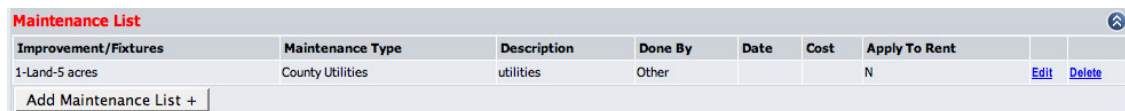
Fields with an asterisk are required. Enter your information and click Insert. The new information will be listed in the Inspections section of the Maintenance/Demolition subcategory.

You may view, edit, delete, or add information about maintenance lists. To edit or delete, click the link to the right of the item in the list.

To add, click the Add Maintenance List button. A dialog such as the one below will appear.

Fields with an asterisk are required. Enter your information and click Insert. The new information will be listed in the Maintenance List section of the Maintenance/Demolition subcategory.

You may view, edit, delete, or add information about assessment payments history. To edit or delete, click the link to the right of the item in the list.

To add, click the Add Assessment Payment button. A dialog such as the one below will appear.

Fields with an asterisk are required. Enter your information and click Insert. The new information will be listed in the Assessment Payments History section of the Maintenance/Demolition subcategory.

You may view, edit, delete, or add information about demolition. To edit or delete, click the link to the right of the item in the list.

To add, click the Add Demolition button. A dialog such as the one below will appear.
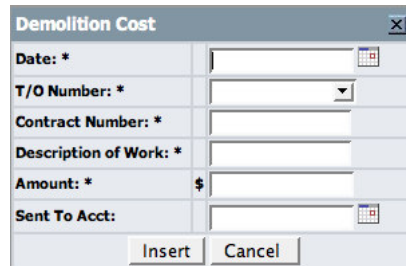
Fields with an asterisk are required. Enter your information and click Insert. The new information will be listed in the Demolition section of the Maintenance/Demolition subcategory.

You may view, edit, delete, or add information about demolition cost breakdowns. To edit or delete, click the link to the right of the item in the list.

To add, click the Add Demolition Cost Breakdown button. A dialog such as the one below will appear.
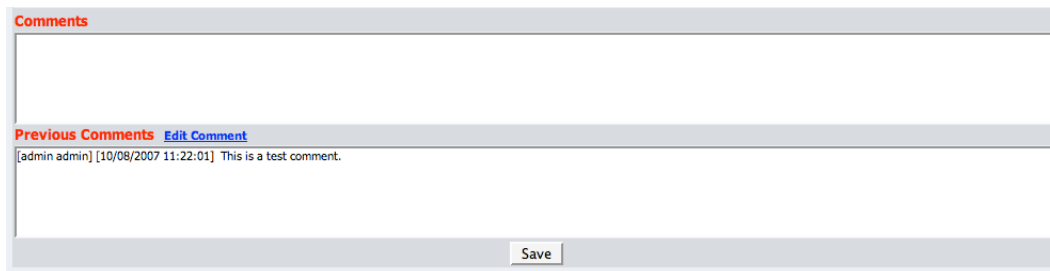
Fields with an asterisk are required. Enter your information and click Insert. The new information will be listed in the Demolition Cost Breakdown section of the Maintenance/Demolition subcategory. Remember to click Save before leaving the page.

The Comments and Previous Comments sections allow you to include notes, as well as view and edit notes entered previously.

If you would like to edit a comment, click the link. The following dialog will appear.

The pick list will show all previous comments. Choose the one you would like to edit from the pick list. It will then appear in the window. Make your edits and click Save.

3.2.5 Disposal: Disposal General

The **Disposal** subcategory includes four minor subcategories: *Disposal General*, *Disposal Sale*, *Disposal Contract Schedule and Payments*, and *Turnbacks*.

In the *Disposal General* subcategory, you may view, edit, delete, or add information regarding disposal process history, surplus appraisal, appraisal review, and auction history. Fields marked with an asterisk are required.

You may view, edit, delete, or add information about process history. To edit or delete, click the link to the right of the item in the list.

To add, click the Add Process History button. A dialog such as the one below will appear.

Enter your information and click Insert. The new information will be listed in the Process History section of the Disposal General subcategory. Remember to click Save before leaving the page.

You may view, edit, delete, or add information about surplus appraisal. To edit or delete, click the link to the right of the item in the list.

To add, click the Add Surplus Appraisal button. A dialog such as the one below will appear.

Fields marked with an asterisk are required. If the desired appraiser is not listed, you may add him or her by clicking the Add Appraiser link. A second dialog box will open within the first.

Enter your information and click Save. Then fill out the rest of the fields in the Surplus Appraisal section and click Insert.

You may view, edit, delete, or add information about appraisal review. To edit or delete, click the link to the right of the item in the list.

To add, click the Add Appraisal Review button. A dialog box such as the one below will appear.

Fields marked with an asterisk are required. If the desired appraiser is not listed, you may add him or her by clicking the Add Reviewer link. A second dialog box will open within the first.

Date Assigned:			Open Market Low Amount:	$
Date Due:			Open Market High Amount:	$
Date Completed:			Abutter Low Amount:	$
DV Number:			Abutter High Amount:	$
DV Approved Date:			Auction Minimum Bid:	$

Insert   Cancel

Then fill out the rest of the fields in the Appraisal Review box and click Insert. The new information will be listed in the Appraisal Review section of the Disposal General subcategory. Remember to click Save before leaving the page.

You may view, edit, delete, or add information about auction history. To edit or delete, click the link to the right of the item in the list.

Auction History

Date	Auction Minimum Bid		
10/05/2007	$80,000.00	Edit	Delete

Add Auction History +

To add, click the Add Auction History button. A dialog box such as the one below will appear.
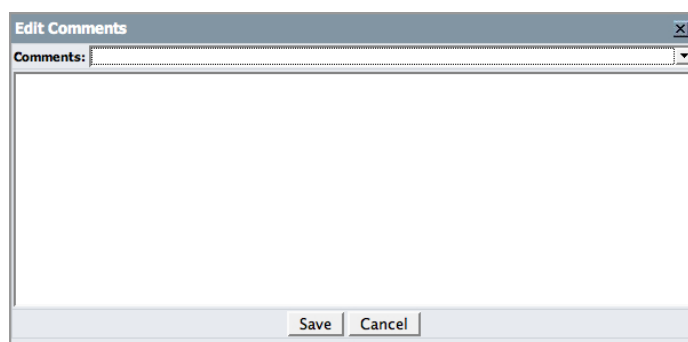
Auction History   ✕
Date: *
Auction Minimum Bid: * $
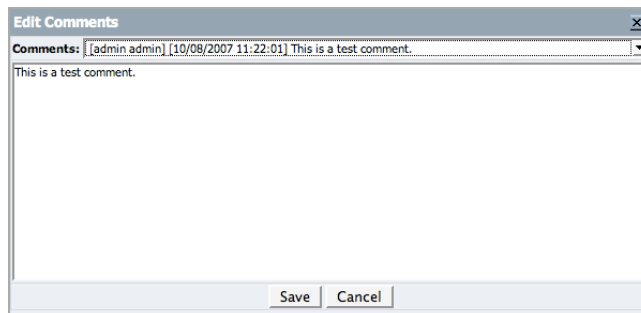Insert   Cancel

Fields marked with an asterisk are required. Enter your information and click Save. The new information will be listed in the Auction History section of the Disposal General subcategory. Remember to click Save before leaving the page.

The Comments and Previous Comments sections allow you to include notes, as well as view and edit notes entered previously.

Comments

Previous Comments Edit Comment
[admin admin] [10/14/2007 21:21:06] This is a new comment.

Save

If you would like to edit a comment, click the link. The following dialog will appear.

The pick list will show all previous comments. Choose the one you would like to edit from the pick list. It will then appear in the window. Make your edits and click Save.

You may also create an entirely new entry for the inventory number in question in the Disposal General subcategory. To do so, click the New button at the bottom of the page. Enter all the desired information in the same manner as described above, then click Update before navigating away from the page.

3.2.5   Disposal: Disposal Sale

In the *Disposal Sale* subcategory, you may view, edit, delete, or add information regarding the cash or contract sale of inventory. You must select a disposal number in the *Disposal General* subcategory before you can proceed through *Disposal Sale*.

You may view, edit, delete, or add information about cash sales. To edit or delete, click the link to the right of the item in the list. To add, click the Add Cash Sale button. A dialog such as the one below will appear.

Cash Sale

Payment Type: *	[dropdown]
Payment Entered Date:	[field] [calendar]
Property Sale Date: *	[field] [calendar]
Property Sale Price: *	$ [field]
Payment Method: *	[dropdown]
Receipt Number: *	[field]
Check Number:	[field]
Payment Received Amount:	$ [field]
Buyer Type:	● Business ○ Individual
Buyer Name & Address: *	[dropdown] Detail Information Add Buyer

Insert   Cancel

If the desired buyer is not included in the pick list, you may add it by clicking the Add Buyer link. When you do, a second dialog box will open within the first.

Buyer Information

Buyer Company: *	[field]
Tax ID:	[field]
Address: Line 1: *	[field]
Line 2:	[field] (Optional)
Line 3:	[field] (Optional)
City: *	[dropdown]
State: *	Washington
County:	[dropdown]
Country:	United States
Zip: (#####-####)	[field]
Phone Number: (###)###-####	[field]
Name:	First Name / Middle Name / Last Name
Contact Number: (###)###-####	[field]
Fax Number: (###)###-####	[field]
E-Mail: (emailid@yourdomain.com)	[field]
Website: (www.yourdomain.com)	[field]

Save   Cancel –

Fields marked with an asterisk are required. Enter your information and click Save. Then continue with the first dialog box, provide the remaining data, and click Insert. The new information will be listed in the Cash Sale section of the Disposal Sale subcategory. Remember to click Save before leaving the page.

You may view, edit, delete, or add information about contract sale disposals. To edit or delete, click the link to the right of the item in the list.

Contract Sale

Property Sale Date	Sale Price	Contract Number		
10/05/2007	$120,000.00	CC-3-00829	Edit	Delete

Add Contract Sale

To add, click the Add Contract Sale button. A dialog such as the one below will appear.

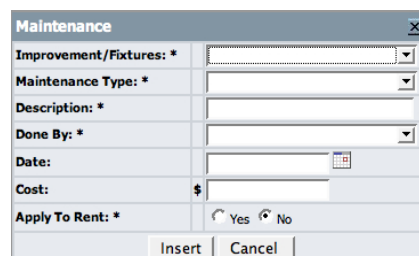Fields marked with an asterisk are required. To choose the contract holder, click the Add button under Contract Holder Name & Address. If the desired buyer is not listed, you may add him or her by clicking the Add Buyer link. Another dialog box will open within the original one.

Enter your information and click Insert. Then fill out the rest of the fields in the Add Contract Sale box and click Insert. The new information will be listed in the Contract Sale section of the Disposal Sale subcategory. Remember to click Save before leaving the page.
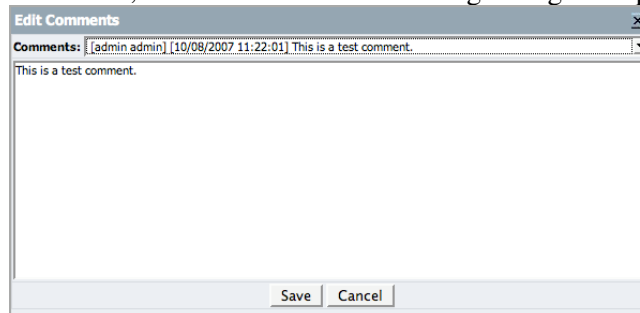
The Comments and Previous Comments sections allow you to include notes, as well as view and edit notes entered previously.

If you would like to edit a comment, click the link. The following dialog will appear.

The pick list will show all previous comments. Choose the one you would like to edit from the pick list. It will then appear in the window. Make your edits and click Save.

3.2.7 Disposal: Disposal Contract Schedule and Payments

In the *Disposal Contract Schedule and Payments* subcategory, you may view, edit, delete, or add payment information, payment history, schedule history, and delinquency pertaining to the disposal inventory.

In the Payment Information section, you may enter the details of the payment schedule and then record payments.

To enter Payment Information, complete the steps in the following order: First, click the New Schedule button. The fields on the right side of the page will look something like this.

Note: The schedule sequence here is three (3) because other schedules were created previously. A disposal may have more than one schedule, but only one is marked Active at any given time. The status of

the schedule above is Pending. You must change it in the pick list if you want to make it Active. However, you must first change the status of the previous schedule to History.

Enter your information (fields marked with an asterisk are required), then click Submit Schedule. Once you do, the screen will appear something like the one below.

	Prev	Next	
Schedule Sequence:	3		
Effective Date:	10/16/2007		
Down Payment Received Date:			
Down Payment Receipt: #			
Down Payment Amount:	$ 0.00		
Down Payment Check: #			
Contract Amount: *	$ 120,000.00		
Contract Length (Months):	0		
Payment Cycle:	Month	▼	
Interest Rate: *	5.50		
Contract Payment Amount:	$		
Schedule Status:	Active	▼	
Interest Effective Date: *	10/16/2007		

New Schedule | Submit Schedule

You may now record payment information based on this schedule. This information is entered on the left side of the screen.

Payment Information

Contract # : CC-03-00829 Doe, Jill

	Prev	Next	
Payment Sequence:	0		
Payment Purpose: *		▼	
Payment Entered Date:			
Payment Received Date:			
Julian Date:			
Payment Method: *		▼	
Payment Check Number:			
Payment Amount: *	$		
Payment Principal Amount:	$		
Payment Interest Amount:	$		
Late Fee Type:		▼	
Late Fee Amount:	$		
NSF Fee:	$		
Other Charges:	$		
Current Interest Paid To Date:			
Interest Paid To Date:			
Remaining Principal:	$		
Payment Status:	Not Committed		

New Payment | Submit Payment

First, click the New Payment button. When you do, the application will automatically populate the fields with information based on the schedule you just submitted.

Then fill in at least the required fields, which are payment method and payment amount. Click Submit Payment. A dialog will appear asking you whether you want to save the payment. If you click yes, then your screen will look something like this.

In the Payment History section, you may view the payments that you entered in the Payment Information section.

Payment History

Sequence	Payment Entered Date	Payment Purpose	Payment Method	Payment Cheque Number	Payment Amount	Principal Amount	Interest Amount	Late Fee	NSF Fee	Other Charges	Remaining Principal	Interest Paid To Date
2		Payment	Electronic funds transfer		$2,000.00	$1,450.00	$550.00				$118,550.00	12/16/2007
1		Payment	Check		$2,000.00	$1,000.00	$1,000.00				$119,000.00	11/16/2007
Total Amounts					$4,000.00	$2,450.00	$1,550.00	$0.00	$0.00	$0.00		

In the Schedule History section, you may see the payment schedules that have been created for the contract. Click the View Details link to the right of each listing, as shown below, to see the full listing.

Schedule History

Schedule Sequence	Effective Date	Contract Amount	Contract Length(Months)	Payment Cycle	Interest Rate	Contract Payment Amount	Interest Effective Date	Schedule Status	
3	10/16/2007	$120,000.00		M	5.50		10/16/2007	A	View Details
2	10/16/2007	$120,000.00	0	S	6.00		10/16/2007	H	View Details
1	10/16/2007	$120,000.00	0	M	10.00		10/16/2007	H	View Details

If a buyer becomes delinquent in payment of their contract, you may view, edit, add, or delete details in the Delinquency section. Edit or delete them by clicking the link to the right of the entries in the list.

Delinquency

Sequence	Notice Date	Delinquency Date	Delinquency Amount	Action	Action Date	Description		
1	10/25/2007	10/23/2007	$1,000.00	C(Letter Number 1)	10/25/2007	letter	Edit	Delete

Add Delinquency +

You may add information about it by clicking the Add Delinquency button. When you do, the following dialog will appear.

Delinquency

Notice Date: *
Delinquency Date: *
Delinquency Amount: * $
Action: *
Action Date: *
Description: *

Insert   Cancel

Enter your data, then click Insert. The information will then be shown in the Delinquency section of the Disposal Contract Schedule and Payments subcategory.

The Comments and Previous Comments sections allow you to include notes, as well as edit notes.

Comments
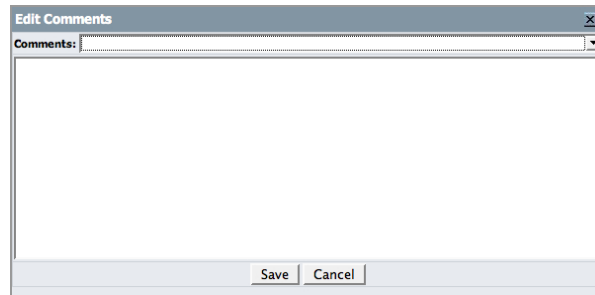
Previous Comments Edit Comment

[admin admin] [10/14/2007 21:21:06] This is a new comment.

Save

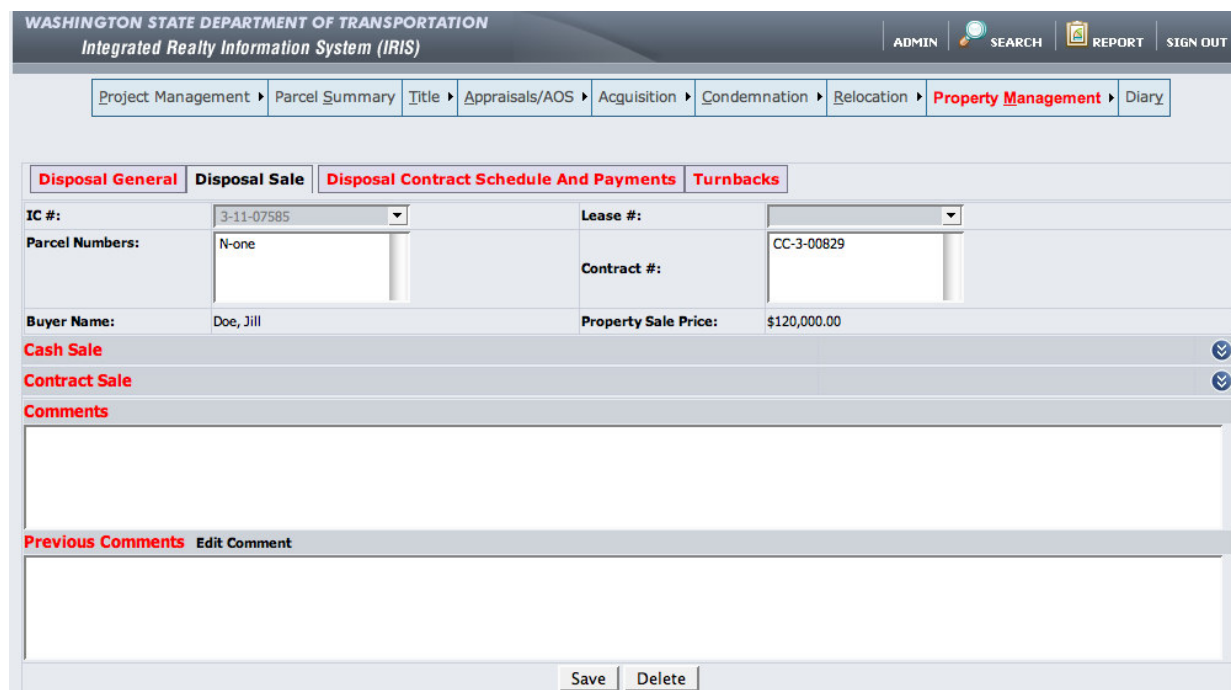If you would like to edit a comment, click the link. The following dialog will appear.
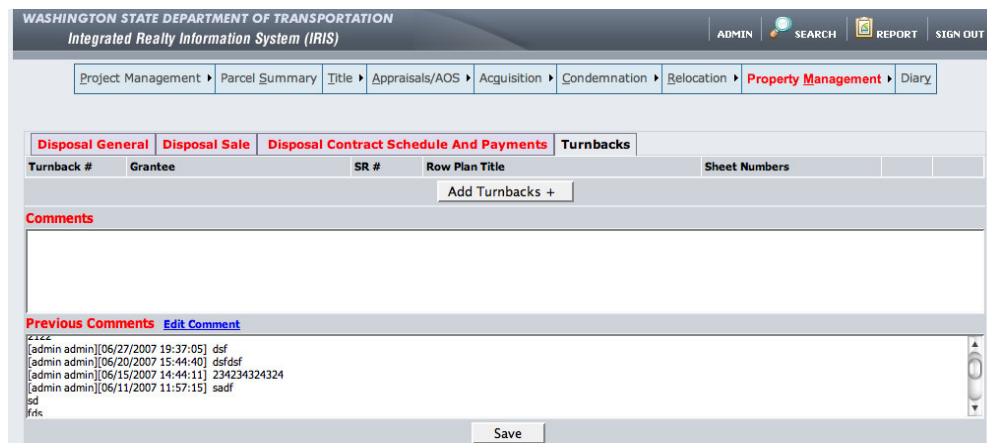
The pick list will show all previous comments. Choose the one you would like to edit. Make your edits and Save.
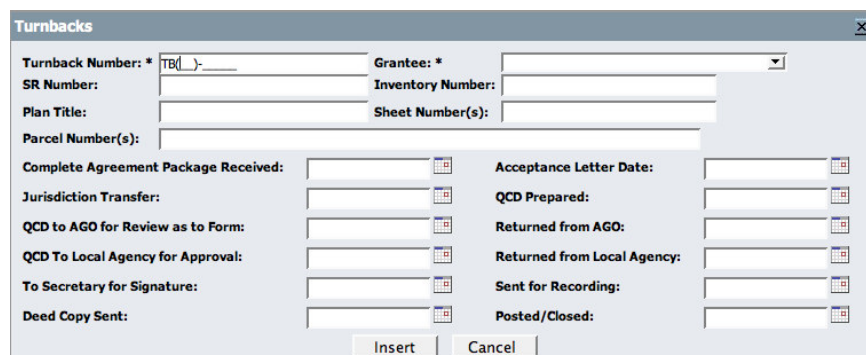
3.2.8 Disposal: Turnbacks

The *Turnbacks* subcategory allows you to view, edit, delete, or add turnbacks. To edit or delete, click the link next to the listing.

To add, click the Add Turnbacks button.

Enter your data, then click Insert. The information will then be shown in the listing within the Turnbacks subcategory. Click Save before navigating away from the page.

3.2.9 Leases: Leases

In the *Leases* subcategory, you may view, edit, delete, or add tenant and address, last month's rent, delinquency, and write off information pertaining to the rental of property.

To enter Tenant/Address information, either select a tenant from the pick list or click the Add Tenant link.

When you do, the following dialog box will appear.

Enter your desired information, then click Save. The tenant will then be listed in the Tenant/Address section of the Leases subcategory.

You may view, edit, delete, or add information about the Last Month's Rent in this subcategory. Simply type the values in the fields and click Save at the bottom of the page.

If a buyer becomes delinquent in payment of their contract, you may view, edit, add, or delete details in the Delinquency section. Edit or delete them by clicking the link to the right of the entries in the list.

You may add information about it by clicking the Add Delinquency button. When you do, the following dialog will appear.

Enter your data, then click Insert. The information will then be shown in the Delinquency section of the Disposal Contract Schedule and Payments subcategory.

To record information about a write off, simply enter the amount and date, then click Save at the bottom of the page.

The Comments and Previous Comments sections allow you to include notes, as well as edit notes.

If you would like to edit a comment, click the link. The following dialog will appear.

The pick list will show all previous comments. Choose the one you would like to edit. Make your edits and Save.

3.2.10 Leases: Lease Payment

In the *Lease Payment* subcategory, you may view, edit, delete, or add payment information, payment history, schedule history, pertaining to the lease inventory.

In the Payment Information section, you may enter the details of the payment schedule and then record payments.

To enter Payment Information, complete the steps in the following order: First, click the New Schedule button. Enter the required information (fields marked with an asterisk). Notice that the LET Amount and Total Payment have both been automatically calculated. Click the Submit Schedule button. You will see that the schedule status has been changed to Active.

Be aware that a lease may have more than one schedule, but only one is marked Active at any given time. If one schedule already exists, you must change its status to History before it can become Active.

You may now record payment information based on this schedule. This information is entered on the left side of the screen.

First, click the New Payment button. When you do, the application will automatically populate the fields with information based on the schedule you just submitted.

Payment Information

Lease # :	RA-03-01769 Jones, Jane
	Prev **Next**
Payment Sequence:	2
Due Date:	11/16/2007
Payment Purpose: *	Payment
Record Entered Date: *	10/17/2007 10:07:06
Julian Date:	A290
Payment Method: *	
Check Number:	
Due Amount: *	$1,742.60
Payment Received Amount: *	$
Rent Amount:	$
LET Amount:	$
Late Fee Type:	
Late Fee Charged:	$0.00
Other Charges:	$
NSF Fee Charged:	$
Payment Status:	Record Not Committed

Submit Payment   New Payment

Then fill in at least the required fields, which are payment method and payment received amount. Click Submit Payment. A dialog will appear asking you whether you want to save the payment. If you click yes, then your screen will look something like this.

Payment Information

Lease # :	RA-03-01769 Jones, Jane
	Prev **Next**
Payment Sequence:	2
Due Date:	11/16/2007
Payment Purpose: *	Payment
Record Entered Date: *	10/17/2007 10:07:06
Julian Date:	A290
Payment Method: *	Check
Check Number:	
Due Amount: *	$1,742.60
Payment Received Amount: *	$1,742.60
Rent Amount:	$1,742.60
LET Amount:	$0.00
Late Fee Type:	
Late Fee Charged:	$0.00
Other Charges:	$
NSF Fee Charged:	$
Payment Status:	Record Committed

Submit Payment   New Payment

The Payment Information section also shows the account balance and other data, which are automatically calculated by the application.

Account Balance:	
Rent Due:	$(192.59)
LET Due:	$192.60
Late Fee Due:	$0.00
Total Amount:	$0.01

In the Payment History section, you may view the payments that you entered in the Payment Information section.

In the Schedule History section, you may see the payment schedules that have been created for the contract. Click the View Details link to the right of each listing, as shown below, to see the full listing.

The Comments and Previous Comments sections allow you to include notes, as well as view and edit notes.

If you would like to edit a comment, click the link. The following dialog will appear.

The pick list will show all previous comments. Choose the one you would like to edit from the pick list. It will then appear in the window. Make your edits and click Save.

3.2.11 Diary

The Diary feature offers each individual user a private place to make comments, notes, and journal entries. Each user is allowed to view only their own diary, not those of other users. The system administrator, however, may view all users' diaries.

The Diary is accessible through both the Acquisition Data and Property Management search portals. Its functionality is the same, regardless of how you enter the diary. Simply insert your comments in the Content field and click the Save button.

4.0   REPORTING

4.0   REPORTING

The Reporting feature allows the user to view basic information about the categories listed below. (To protect the security of the IRIS database, no screen shots of the reports have been provided.)

4.1   Active Contracts

Select the region from the pick list for which you want to view the data. You may choose one or all of the WSDOT Regions.

Selection Criteria

Region: | ALL Regions ▼ |

Search

When you search in this category, the application generates an alphabetical list of the following information as of the current date: Contract Buyer, Contract Number, IC Number, Payment Cycle, Principal, Payment Due.

4.2   Active Rental Agreements

Select the region from the pick list for which you want to view the data. You may choose one or all of the WSDOT Regions.

Selection Criteria

Region: | ALL Regions ▼ |

Search

When you search in this category, the application generates an alphabetical list of the following information as of the current date, for whichever region you choose: Leases, RA Number, Effective Date, IC Number, Lease Cycle, Rent, LET, and Total.

4.3 Annual Contract Payment Summary

Select the year from the pick list for which you want to view the data. You may choose any year from 1983 to the current year.

Selection Criteria

Year: | 2007 ▼ |

Search

When you search in this category, the application generates an alphabetical list of the following information for each entity that has an annual contract with WSDOT: Contract Number, Date Received, Payment Method, Payment Amount, Principal Paid, Interest Paid, Last Fee Paid, Other Charges Paid, and Remaining Principal.

4.4 Contract Delinquent

First, choose the number of days delinquent for the contracts you are searching, from the following: 30, 60, 90, 120, 150, and 180. Then choose the region from the pick list for which you want to view the data. You may choose one or all of the WSDOT Regions.

Selection Criteria

Number of Days: 30 ▼

Region: ALL Regions ▼

Search

When you search in this category, the application generates an alphabetical list of the following information as of the current date: Buyer, Contract Number, IC Number, Payment Rate, Payable, Last Payment Date and Amount, and Interest Paid to Date.

4.5 Contract Statement

First, choose the contract number from the pick list. Then choose the statement type you would like to view for that contract number, either All Statements or Single Statement.

Selection Criteria

Contract Number: 829 ▼

Statement Type: All Statements ▼

Search

When you search in this category, you will see facsimiles of statements sent for the contract number selected.

4.6 Disposal Processing Inventory

Select the region from the pick list for which you want to view the data. You may choose one or all of the WSDOT Regions.

Selection Criteria

Region: ALL Regions ▼

Search

When you search in this category, the application generates an alphabetical list of the following information as of the current date: Inventory Number, Location, Process Date, Current Activity, and Elapse Days.

4.7 Master Inventory List

Select the region from the pick list for which you want to view the data. You may choose one or all of the WSDOT Regions.

Selection Criteria

Region: ALL Regions ▼

Search

4.8 Parcel Dates Updated

Select the project ID for which you want to view the data from the pick list. You may choose one or all of the existing projects.

Selection Criteria

Project ID: [All Projects ▼]

[Search]

When you search in this category, the application generates the following information as of the current date: Project Description, Parcel Number, Date Approved to HQ, Date DV Approved, Firm Offer Date, Owner Sign Date, Received for Approval, Pay Available Date, Relocation Cert Clear, PM Cert Clear, Payment Date, Date Judgment PD to CRT, P&U Date, Trail Date, and Date Judgment Cert.

4.9 Project Funding Estimate – Detail

Select the project ID for which you want to view the data from the pick list.

Selection Criteria

Project ID: [640 ▼]

[Search]

When you search in this category, the application generates the following information as of the current date: Parcel Number, Parcel Owner Name(s), Improvements, Acquisition Type, Acquisition Compensation, Relocation Assistance, Relocation Assistance Compensation, and Property Location.

4.10 Project Funding Estimate – Summary

Select the project ID and version for which you want to view the data from the pick list.

Selection Criteria

Project ID: [640 ▼]

Version: [–1 ▼]

[Search]

When you search in this category, the application generates the following information as of the current date: Acquisition Expenses, Relocation Expenses, Other Expenses, and Total Funding Estimate.

4.11 Rental Delinquent

Select the region from the pick list for which you want to view the data. You may choose one or all of the WSDOT Regions.

Selection Criteria

Region: [ALL Regions ▼]

[Search]

When you search in this category, the application generates an alphabetical list of the following information as of the current date: Leassee, RA Number, Effective Date, IC Number, Lease Cycle, Rent, LET, Out. Rent, and Out. LET.

4.12 Rental Statement

First, choose the rental month, day, and year from the pick list. (If you leave the day blank, then the entire month's activity will be displayed.) Then choose the rental type—Active, History, or Pending—that you would like to view.

Selection Criteria

Month:	January ▼
Day:	▼
Year:	2007 ▼
Rental Type:	ALL Types ▼

Search

When you search in this category, the application generates facsimiles of the rental statements sent for the time frame selected.

5.0   SYSTEM ADMINISTRATION

5.0 SYSTEM ADMINISTRATION

Not all users will be able to access the Administration section. However, those who have privileges may complete the operations described below.

5.1 Managing Users

The following is the window you will see when you navigate to Administration from the System Menu (Simple Search) page:

Basic contact information for the user is given, as well as the options to edit, delete, activate, or add a new user.

To return to this page from another area of the Administration module, click the Manage User icon in the upper right menu.

5.1.1 Adding Users

The Administration module allows you to add a new user to the system. To do so, click the Add New User icon. The following dialog box will appear:

All fields marked with an asterisk are required. Note that you may choose whether the user being added is a WSDOT staff member or an outside consultant. You may also indicate that the individual is an administrative level user by checking the box in the lower left corner.

When selecting the user's region, you may choose multiple regions by holding down the control (command on a Macintosh) key while clicking.

In order to assign permissions, or privileges, to the user, you must first save the information you have just entered. Once you save, you will be able to assign either read or read/write permissions for each area of IRIS. Choose from among the folders in the left hand pane to select the area for which you need to assign privileges. The default assignment in each area is none.
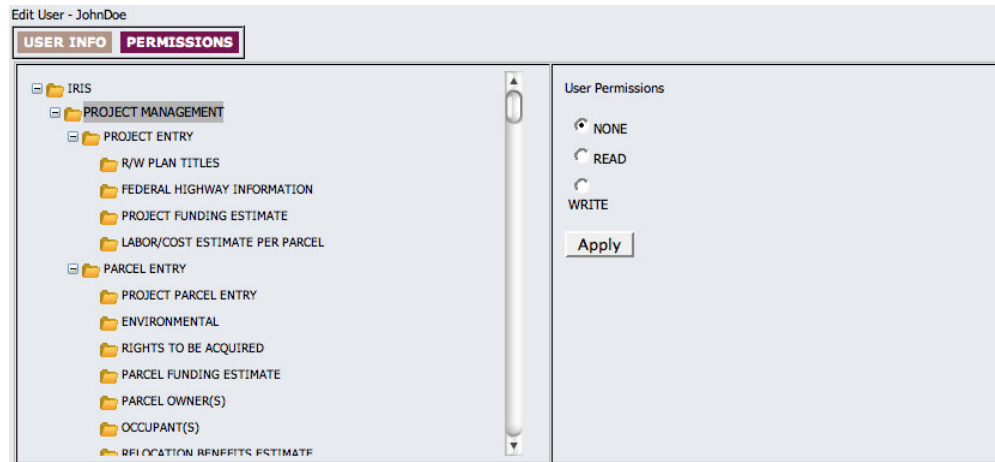
5.1.2 Editing Users

To edit information for a user already in the system, click the edit link next to their name. The dialog box that appears will allow you to make changes to the user's basic information. Please note that initially no text is displayed in the password field. When changing a user's password, asterisks will be shown instead of the actual characters chosen.

5.1.3 Deleting Users

To delete a user from the system, click the delete link next to their name. A dialog box will prompt you to be sure you want to delete them. If you chose yes, then a message in green type will appear in the upper left corner of the window stating that the "selected user has been deleted successfully."

Administrators should be aware, however, that, in order to maintain referential integrity, no user is ever actually deleted from the system—they are simply made inactive. Every user is associated with work (projects created, comments made, etc.) that he or she has done in the system. If a user were to be deleted, all of the work with which their user name is connected would also be deleted. In order to avoid such a loss, the user is retained in the system, although they are not shown in the list of active users.

5.1.4 Activating Users

In order to make an inactive user active once again, the administrator must click the Activate User button. When you do so, a field will appear beneath that button. There, you enter the User Name for the user you want to activate. You must know the User Name in order to activate the user.

Once the User Name has been entered and the Activate button clicked, the user then reappears in the list of active system users.

5.2   Master Entries

This section of the Administration module allows the administrator to add or change information about items in the system's database.

5.2.1 Entries in Reference Tables

To find and/or edit information for an entry in a reference (or lookup) table, select an entry item from the pick list. For example, if "IRIS_REF_CITY" were chosen, the following screen would appear:

The administrator then may choose to edit or delete the cities listed, or to insert a new city, by clicking the provided links. The Insert link appears at the very end of each list; go to the final page to locate it.

5.2.2 Entries for Individuals

To find and/or edit information for an individual entry, select an individual from the pick list. Once an individual has been chosen, click the Detail Information link to see all available information.

Master Entry for Individuals

Name:	Doe, Jane (Lessee)-Olympia ▼ Hide Information Add Individual
Individual Type: *	Lessee ▼ Agent Type: ▼

Name:	First Name *	Middle Name	Last Name *
	Jane		Doe

Social Security Number:	___-__-____
Staff or Consultant:	○ Staff ● Consultant
Company Name:	▼

Address:	Line 1: *	111 Any Street
	Line 2:	(Optional)
	Line 3:	(Optional)

City: *	Olympia ▼
State:	Washington ▼
County:	▼
Zip: (#####-####)	_____-____
Phone Number: (###)###-####	(___)___-____
Contact Number: (###)###-####	(___)___-____
Fax Number: (###)###-####	(___)___-____
E-Mail: (emailid@yourdomain.com)	
Website: (www.yourdomain.com)	

[Save] [Cancel –]

Note that if you attempt to delete data in a field marked with an asterisk, you will be unable to save your changes. After making your changes, click Save.

You may also add a new individual. When you select that option, a window such as the one below will appear. Enter your information, and click Save before leaving the page.

5.2.3 Entries for Businesses

To find and/or edit information for a business entry, select a business from the pick list. Once a business has been chosen, click the Detail Information link to see all available information.

Note that if you attempt to delete data in a field marked with an asterisk, you will be unable to save your changes. After making your changes, click Save.

You may also add a new business. When you select that option, a dialog box will appear.

Enter your information, and click Save before leaving the page.